

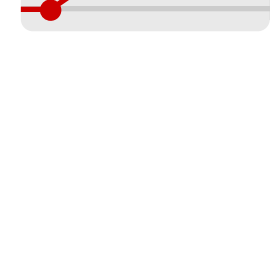
# The future of care is focused on the whole person

Consumers and providers alike say they need a health system that's local, more digital and focused on achieving better outcomes for chronic conditions.



## Chronic health conditions are motivating consumers to set health goals.

Top four chronic conditions consumers face today:



**42%** Obesity or other weight concerns

**40%** High blood pressure

**32%** Mental illness

**20%** Diabetes

Top five health goals:



**59%**

Eating habit/diet



**47%**

Fitness



**45%**

Better sleep



**43%**

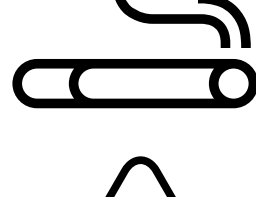
Stress reduction



**36%**

Mental health

Consumers say they, or someone they know, have struggled with these three lifestyle habits in the last five years:



**39%**

Nicotine use



**35%**

Personal pain management



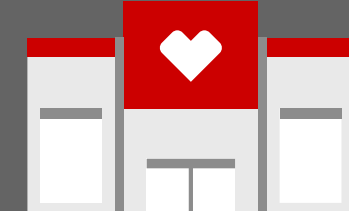
**26%**

Alcohol use

## More than 80% of consumers say they have a primary care provider (PCP), but the need for convenient, accessible care is leading to change.



**59%** still visit their PCP



But **25-30%** visit walk-in, ER and urgent care facilities

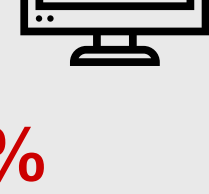
Resources consumers trust most for health information:



**75%** are very likely to take advice from their PCP



**27%** rely on their pharmacist, followed by nurse practitioner (26%) and physician assistant (23%)



**38%** use online search tools such as WebMD

## Digital tools help consumers communicate with their doctors and other providers.

Top three tools that motivate people to interact with their providers:

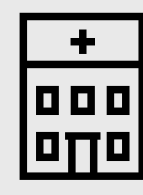


**41%** Digital messaging

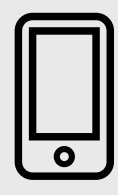
**20%** Virtual office visits

**18%** Telehealth

Millennials — and their unique health concerns — are driving the future of health care:



**27%** Have a PCP, the lowest among consumers



**29%** Say apps to track progress toward their health goals would be helpful



**28%** Say websites and blogs providing advice would be helpful

Millennials are more likely to use the following to track their health goals:

**Millennials**



**28%**

Computer/electronic diary or app

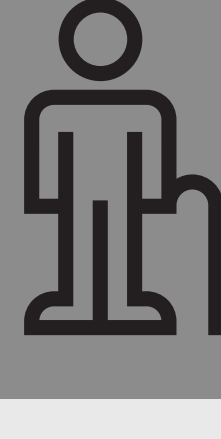
**27%**

Wearable tracker

**26%**

Calorie counter

**Ages 65+**



**7%**

Computer/electronic diary or app

**15%**

Wearable tracker

**5%**

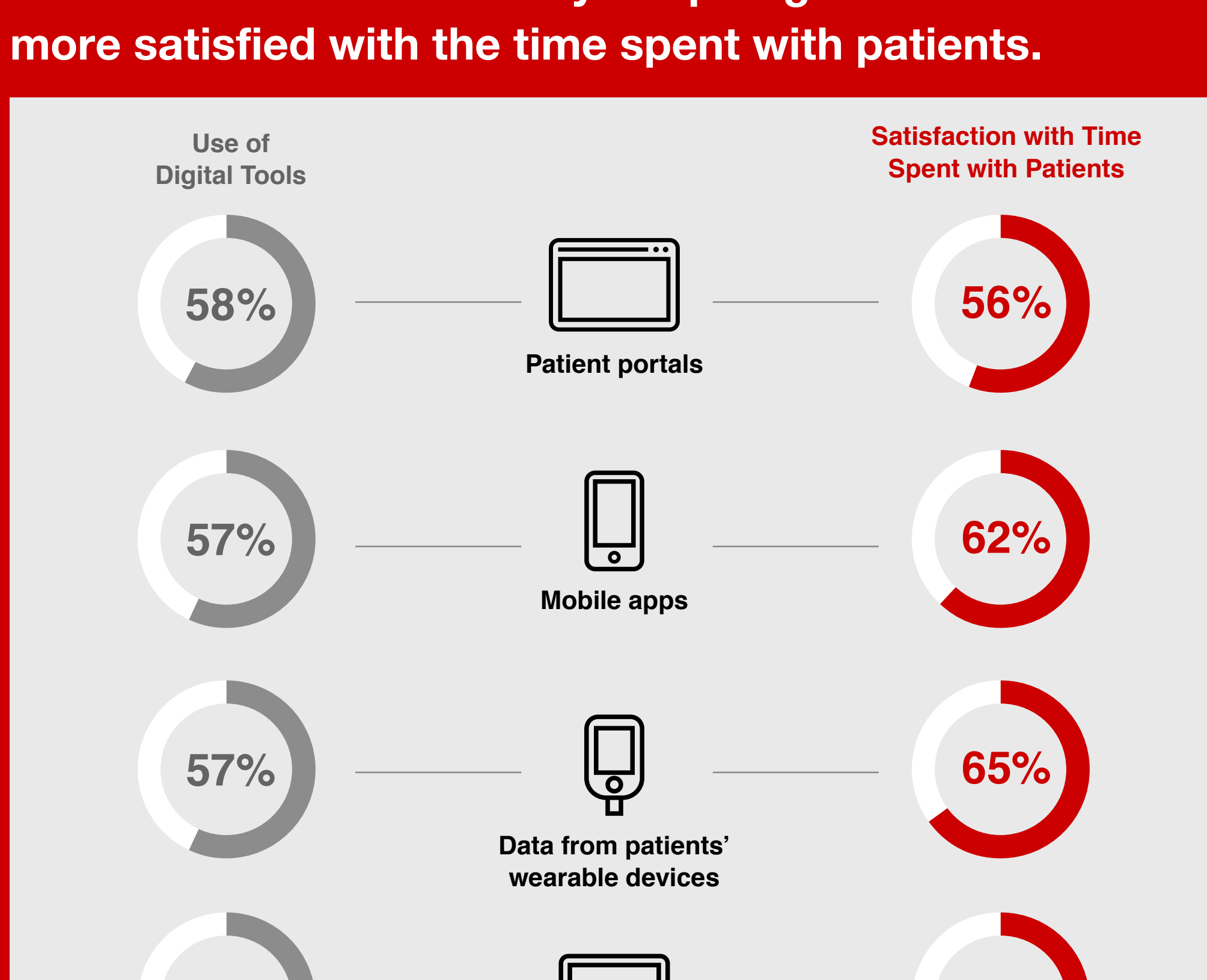
Calorie counter

## Better provider adoption of digital solutions could lead to improved patient outcomes.

Providers say they need support for overcoming the top two barriers to spending enough time with patients:

Documenting patient care through electronic health records (EHRs):		Keeping up with growing administrative burdens:	
<b>55%</b>	Nurse practitioners/ Physician assistants	<b>27%</b>	
<b>53%</b>	General practitioners	<b>36%</b>	
<b>47%</b>	Specialists	<b>33%</b>	
<b>11%</b>	Pharmacists	<b>42%</b>	

Providers who successfully adopt digital tools are more satisfied with the time spent with patients.



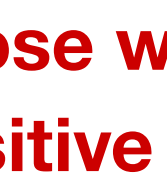
## Value-based care — which rewards providers for better patient outcomes — is leading to change.

**62%** of providers say their practice is highly involved or becoming involved in the use of value-based care



Among providers who have heard of value-based care (67%) more than half (57%) are very satisfied with time spent with patients compared to just 43% of providers who have not heard of it

Those who say value-based care will have a positive impact:



**93%**

Pharmacists



**71%**

Specialists



**65%**

General Practitioners



**64%**

Nurse Practitioners / Physician Assistants

Want to learn more? [Click here.](#)

About the study

The Path to Better Health Study by CVS Health, first released in 2018 and called the **Health Ambitions Study**, was conducted in April and May 2019 and included two surveys fielded by Market Measurement, a national market research consulting firm. The consumer survey comprised 1,000 participants 18 and older, located throughout the U.S. It also oversampled six metropolitan statistical areas — Atlanta, Austin, New York, Philadelphia, Seattle and South Florida, and among two ethnic groups: African Americans and Hispanics. The survey of 400 providers focused on primary care physicians and specialists with at least two years' experience. In 2019, the study was expanded to include nurse practitioners, physician assistants and pharmacists.

